

Ascend 2.0 Overview

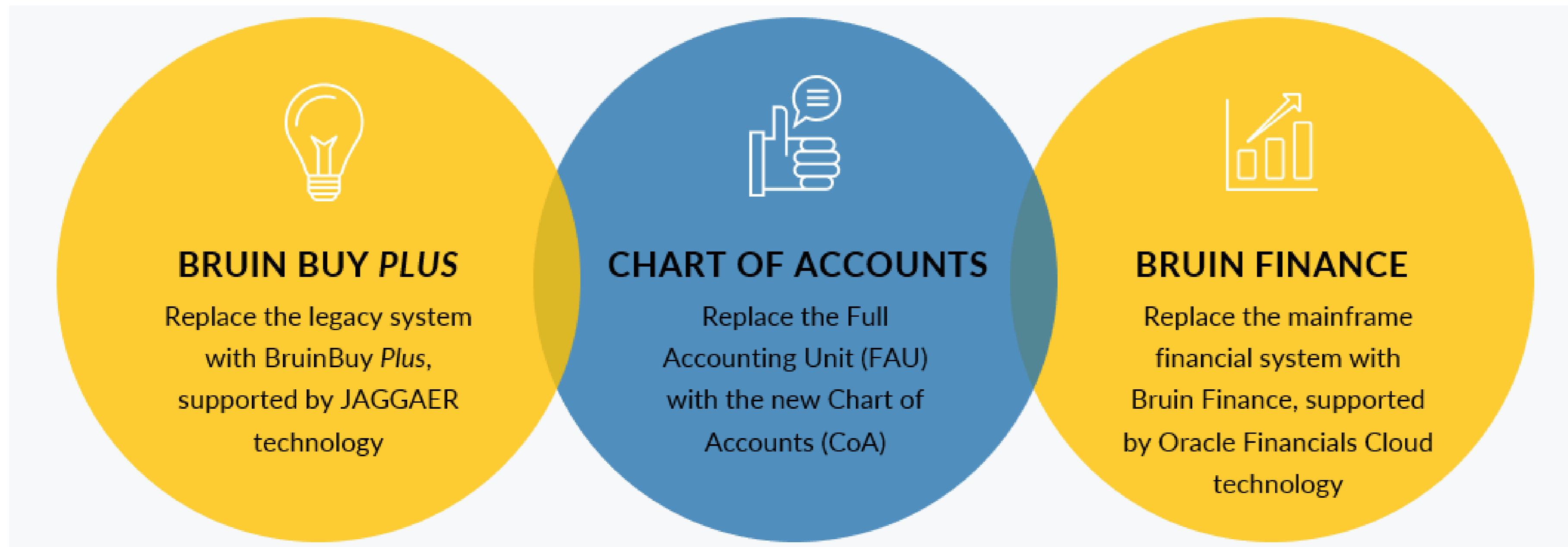
February 2023

Yoon Lee

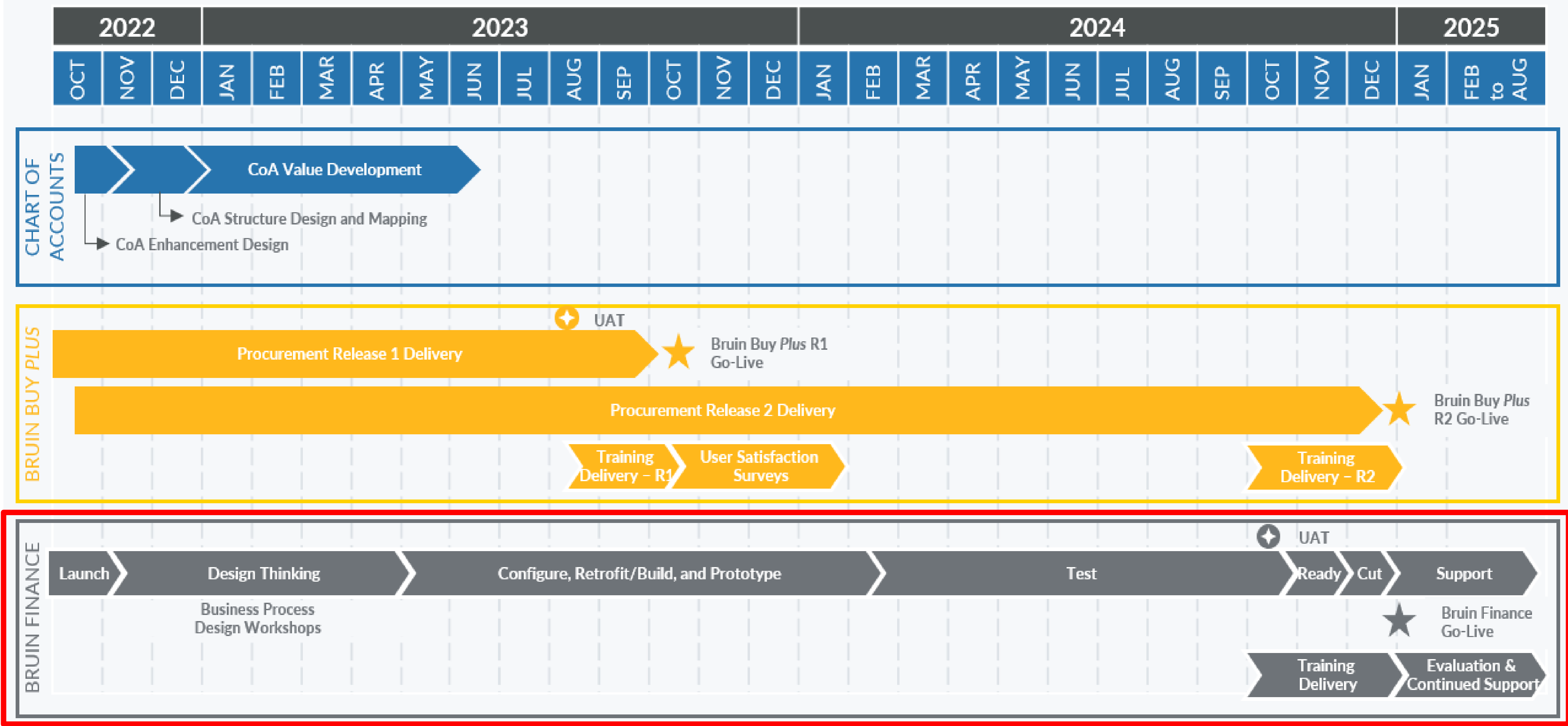


Ascend 2.0

- **January 19, 2023: Announcement of Ascend 2.0 | Financial System Transformation Relaunch from the Ascend 2.0 Executive Sponsors;**
 - Allison Baird James, Interim Vice Chancellor/CFO
 - Michael Beck, Administrative Vice Chancellor
 - Roger Wakimoto, Vice Chancellor, Research & Creative Activities
- **The Ascend 2.0 program is comprised of three major strands of work.**

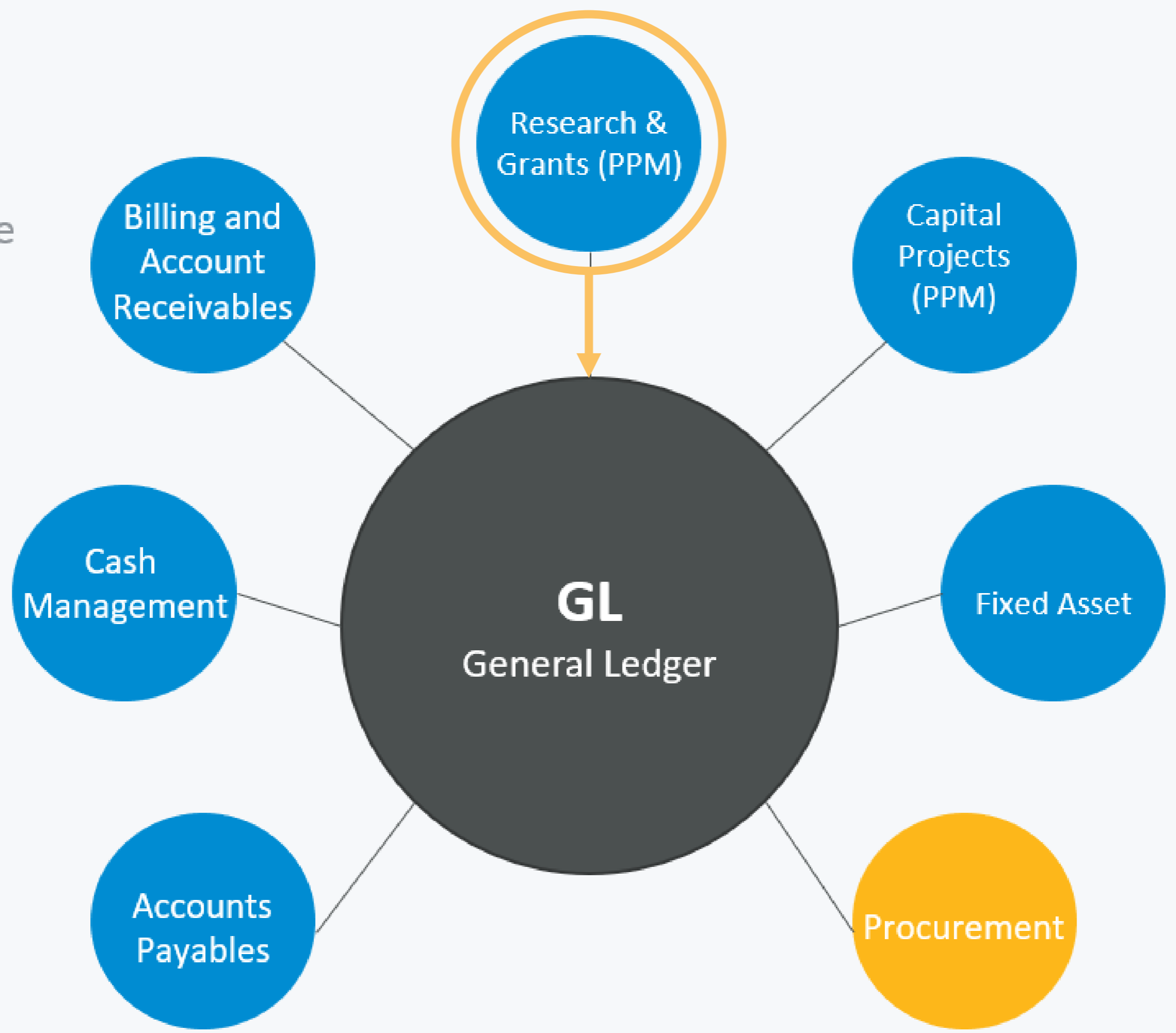


High Level Program Timeline



Functional Modules Overview

Our functional leads are aligned with sub-ledger modules. There will also be leads for Planning + Budgeting tools and the CoA/Reporting, which crosses all modules.



Expenditures of all contract and grants will be managed through PPM (Project Portfolio Management)

The Procurement module is the only one dedicated to customizing business processes for JAGGAER software, instead of Oracle Fusion Cloud.

- Oracle modules
- Jaggaer

Ascend 2.0: Campus Engagement

- **Committee Formation:** The “Four Corners of the University” are meeting as Advisory Committees to help the program build a final product that benefits the greater good of the university. Five Advisory committees have been formed and had the first meeting last month in January.
 - Research
 - Finance
 - Technology Enablement
 - Change management
 - Sustainment



- **Stakeholder Analysis:** The Change Management team conducted a stakeholder analysis to better the UCLA community and the impact on and influence of key stakeholder groups relative to Ascend 2.0. The Team interviewed members of Ascend 2.0 Advisory Committees and other key leaders across the "four corners" of the University (Academic, Non-Academic, Research, and DGSOM).

Research Engagement

- The program leadership recognizes the importance of supporting research community for successful Ascend 2.0.
- Research is represented in multiple levels across the Ascend 2.0 program team.
 - **Executive Program Sponsors:** Roger Wakimoto, Vice Chancellor for Research
 - **Program Owners:** Marcia Smith, Associate Vice Chancellor for Research and Yoon Lee, EFM Senior Director
 - **Research Workstream Business Analysts:** Katie Cadle (Lead), Stephanie Perez, and Emma Tisovec in EFM
 - **Research Workstream Subject Matter Experts:** 15 + experts in ORA are devoted to provide their expertise to support the success of the program.
- **Campus Engagement**
 - **Subject Matter Experts:** For the processes impacting the department, the research team will reach out to SMEs in the relevant area on campus to listen to the department's perspectives in exploring solutions and solicit feedback on the design of the processes.
 - **Research Advisory Committee:** Ascend 2.0 will rely on guidance, insight and perspective from the advisory committee to design the processes that will work for the research community. It is co-chaired by Marcia and Yoon and includes 11 committee members, including 10 department representatives across campus.
 - **Research Stakeholders Analysis:** The change management team interviewed 28 stakeholders so far in the research (Department fund managers and the management (CAO/CFO/MSO/Directors)) across campus to get insights into our business processes, challenges and opportunities for improvement.

Research Team: Current Key Activities

- Confirmed different roles and refined user stories from the Ascend 1.0
- Reviewed and updated 39 business process maps so far from the Ascend 1.0 to reflect changes occurred in the system and business processes.
- Discussed conversion scope and approach for research data and started data mapping for conversion.
- Identified an inventory of reports to develop to support research operation.
- Close to finalize fit-gap analysis.
- Started assessing and reviewing integration documents from Ascend 1.0.

February Town Hall

- **What:** This Town Hall is an opportunity for stakeholders across the UCLA community to learn about the Ascend 2.0 program, including its mission, guiding principles, and benefits; program leadership and governance; and ways to engage with the program and share feedback. The event will culminate with a live Q&A session, during which members of program leadership and Subject Matter Experts will answer stakeholder questions.
- **When:** Wednesday, February 15, 2023, from 8:30 AM – 9:30 AM PST
- **Where:** Virtual Webinar
- **Why:** Ascend 2.0 is an ambitious, multi-year initiative to transform the landscape of UCLA's financial systems. This Town Hall is an opportunity to understand how the program is structured, what is changing, and how to engage with and prepare for the implementation.

REGISTER HERE:

https://ucla.zoom.us/webinar/register/W_N_QwQmuFDNRn-_3ON5-N5_vw

ASCEND 2.0 WEBSITE: Visit <https://ascend.ucla.edu/> for more information

Any Questions?

Contact Information

EFM Website

<http://efm.research.ucla.edu>

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